

Summary

The importance Mexican citizens place on having a command of the English language is a trend that has resulted from Mexico's role as player in the world economy and international politics, and even more specifically as a result of growing economic and cultural interdependence between Mexico and the United States. The United States is the largest foreign investor in Mexico, its largest trading partner, the leading source of its international tourists, and the preferred destination for Mexican nationals seeking graduate education.



Market Overview

It is now uncommon to find a senior executive in a local or foreign company operating in Mexico that does not have English language skills. The need for these skills has also trickled down to everyone from students interested in obtaining university and post-graduate degrees in the U.S. to service workers who need to interact with English-speaking customers and tourists on a regular basis. As a result, the majority of private schools in Mexico, from elementary school to college, teach and require basic English as part of their curriculum.

The Mexican government has introduced ESL programs in some public high schools and will gradually launch those programs at middle and elementary schools. The federal Ministry of Education determines the basic curriculum and authorizes the textbooks that public schools use. A government-owned publisher supplies the majority of these books without any cost to the students, but there are optional titles that the Mexican state Ministries of Education or individual schools can opt to adopt. Currently, most public schools offer English classes only in high school, but the states of Tamaulipas and Nuevo León recently introduced English classes for grades 1-6.

There is a growing demand for English language competency within Mexican higher education, as well. There are a significant number of universities offering English as an undergraduate degree program. Several Mexican private universities require the TOEFL Institutional exam as a requirement for students in all fields of study in order to get their degree.

Destination of
TOEFL Scores from Mexico

	1999-00	2001-02	2003-04
U.S.	69.1%	64.7%	57.7%
Canada	13.4%	14.2%	17.3%
England	11.8%	11.3%	11.0%
Australia	1.5%	1.3%	3.6%
Mexico	1.4%	3.0%	2.8%
Germany	0.3%	1.3%	2.4%

It is estimated that between 4-6% of ESL students travel abroad for intensive English programs. Of those traveling to other countries, 95% visit the United States, Canada, or Great Britain. Other destinations include Ireland and Australia. The number of ESL students studying abroad represents a small fraction of the number participating in ESL programs in Mexico, most commonly at private schools. Increasingly, these programs are offered at public schools, at which approximately 85% of the student population studies. Both the private- and public-school markets represent attractive opportunities for U.S. programs that wish to provide service or programs in Mexico, and the private-school market is particularly attractive for U.S. institutions that target students with the resources and desire to study in the United States.

Distribution of Students in Mexico 2003-2004

Grade	Public	Private
Middle School	4,926,354	446,296
High School	2,715,661	728,079
Technical - Professional	365,000	69,835
Technical & Higher Education	1,951,284	646,064
Postgraduate	143,629	57,269

Source: SEP (Mexican Ministry of Education)

According to the Open Doors Report published by IIE, 883 Mexican students traveled to the United States to take advantage of ESL programs in 2003, a 79% decrease from 2001. Analysts believe that the decline is most likely due to the economic downturn in Mexico and not by difficulties in obtaining U.S. student visas. The preferred destinations for Mexican ESL students studying in the United States in 2003 include New York, Los Angeles, Boston, Washington D.C., Chicago, Philadelphia, Houston, Dallas, San Jose and San Francisco.

Rank	Place of Origin	Total Students 2003
1	Japan	10519
2	Korea, Republic of	10412
3	Taiwan	4235
4	Italy	1408
5	Brazil	1359
6	France	1156
7	Turkey	1034
8	Thailand	943
9	Mexico	883
10	Colombia	858

*Source: Open Doors

Other very popular destinations for Mexican students seeking ESL training in English-speaking countries include Canada and the United Kingdom. In fact, the 6,800 students who studied ESL in these two countries vastly outstripped the 883 students studying in the United States, indicating a significant market opportunity for U.S. institutions willing to dedicate more focus and resources on recruiting students in Mexico.

Estimated Number of Students attending ESL programs outside of Mexico 2003*

United States	883
Canada	3,800
Great Britain	3,000

Source: IIE, British Council, Canadian Education Center, Open Doors.

The factors that students most commonly consider when selecting an ESL program outside of Mexico, in order of importance, include:

- ◆ Cost
- ◆ Duration
- ◆ Curriculum (subject specific program beyond basic English study. e.g., business English)
- ◆ Location
- ◆ Extracurricular activities
- ◆ Lodging options
- ◆ Certifications / Accreditation

Competitive Environment

The most popular destinations for Mexican ESL students are Canada, the United Kingdom and the United States. More than 95% of Mexican students visit one of these three countries. Australia has experienced an increase in Mexican ESL students, but due to the high costs of airfare, the number of students is still low.

The British Council in Mexico receives 20,000 requests for information on educational programs per year, of which 4,100 are students interested in ESL programs. The number of Mexican students traveling to the UK for education is about 3,000 per year, and their average stay is two weeks. The biggest incentive to attend programs in the UK is the large number of agreements established between British institutions and Mexican private schools and universities. Another important factor is its close proximity to continental Europe, which provides an opportunity for visiting other countries. Many Mexicans that have studied ESL in the UK have commented that learning English there would allow them to have a more precise command of the language. The British council is also an important supporter of ESL programs in Mexico, especially for the promotion of their institutions as a destination for Mexican students interested in post-graduate education.

Three years ago, the British Council opened up an English Language Teaching Center where it offers English classes at varying levels of competency, IELTS preparation courses, conversation clubs and English teaching courses. The British Council has experienced incredible success with this program, registering approximately 500 Mexican students for each 10-week semester. The overwhelming majority of their students are business professionals and students looking to apply for scholarships to British universities.

The Canadian Embassy in Mexico processes an estimated 50,000 to 60,000 requests for information on educational programs per year, of which about 30% are for ESL programs. Canada received around 3,500 Mexican ESL students during 2003, with an average stay of six weeks. Canadian institutions are taking into consideration the growing interest in ESL and reevaluating their programs to offer more attractive options, such as lower price, ease in obtaining student visas, and access to some of Canada's most important educational institutions. Additional factors that make Canada more competitive include subsidies for lodging with local families and the possibility to work part-time in the Canadian Education Center to defray a portion of ESL program costs. Unlike the United States, Canada requires a student visa only if the student plans on staying over six months.

ESL Opportunities for U.S. Institutions

All sources interviewed for this report indicated that the number of Mexican students seeking ESL programs abroad represented a very small fraction of the market potential, but that adequate marketing of U.S. programs in private schools and education trade fairs could contribute significantly to increased demand. In addition, combining ESL programs with introductory or specialized courses could also increase demand.

One significant ESL trend in the Mexican market is the increasing interest in distance-learning programs. Another trend is that corporate-sponsored programs are decreasing in number and length due to price considerations as well as employment practices that require new hires to have a command of English as a prerequisite.

The Mexican government provides funding and supports for the country's English teachers to visit the United States for advanced ESL training. This is a market niche opportunity for those institutions interested in offering ESL programs for Spanish-speaking English teachers.

Resources

ESL schools, institutes, and universities in the United States should seek to develop alliances with Mexican private schools and universities in search of mutual benefits. Both the IIE and the U.S. Commercial Service in Mexico City work hand-in-hand to provide the contacts and matchmaking opportunities for interested U.S. providers.

At the EducationUSA Advising Center in Mexico City, students seeking information on studying ESL in the U.S. use the reference materials provided by the U.S. Department of State and U.S.-based intensive English program member associations. The publications in use currently at the advising center are *IIE Intensive English USA*, *UCIEP Member Directory* and *AAIEP Member Directory*. Online resources that students are encouraged to use are the UCIEP and AAIEP websites. Also, EducationUSA advisers are encouraging students to investigate opportunities available at the institutions that have accreditation with the Commission on English Language Program Accreditation (CEA), a newly formed national accrediting body recognized by the Council of Higher Education Accreditation and the U.S. Department of Education.

English Language Officer (RELO) organizes and participates in teacher training seminars and workshops, advises posts on questions pertaining to English teaching, conducts needs assessments, and offers guidance on all aspects of an academic program. The RELO consults with host-country ministry, university, and teacher-training officials, as well as lecture and presents workshops on EFL methodology and practices. The RELO also works closely with English Language Specialists, English Language Fellows, and U.S. Embassy-related English Language Programs (Binational Centers, and U.S. Embassy English Teaching Programs).

Key Contacts

U.S. colleges, universities and other educational institutions can find a wealth of information for activities with Mexico using resources available from members of **EducationUSA-Mexico**. We are here to help you establish ties to Mexico and in an effort to internationalize your institution, identify methods to promote your programs, recruit Mexican students, develop faculty exchanges, collaborate with Mexican institutions of higher education, and identify financial aid and scholarships opportunities for Mexican students and faculty to study, research or teach on your campus. For more information please visit us at: www.usembassy-mexico.gov/educationusa

Secretaría de Educación Pública: www.sep.gob.mx

Office of Academic Programs/Cultural Affairs Section (U.S. Embassy) - <http://www.usembassy-mexico.gov/eCult1.htm>

OFFICE OF ENGLISH LANGUAGE PROGRAMS – Mexico
<http://exchanges.state.gov/education/engteaching>
daviskm@state.gov

Institute of International Education: <http://www.iie.org/latinamerica>

Upcoming Trade Shows / Events

The U.S. Embassy in Mexico encourage U.S. schools interested in recruiting Mexican students to participate in the 4th annual **STUDY USA Pavilion at UNIVERSITAREA 2005**, November 10 to 13. UNIVERSITAREA 2005 in its 9th year is Mexico's leading education exhibition. www.universitarea.com.mx or www.buyusa.gov/mexico/en

For further information about the education and training services market and the services provided to U.S. firms by the U.S. Commercial Service to access to these business opportunities, please contact:

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